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ABSTRACT

Basic and advanced workshops on strategic planning and management for college personnel were held in 1985. Strategic planning and management includes: (1) assessing an institution's external environment to determine opportunities/threats; (2) auditing an institution's internal environment to determine strengths/weaknesses; (3) using these two sets of information to develop visions and alternative scenarios; and (4) making deliberate choices about strategic options and tactical alternatives as a prelude to managing the plan. Participants completed an institutional characteristics sheet, which is appended. Techniques for assessing the external environment include needs assessment, market analysis, environmental scanning, and trend analysis. Auditing the internal environment would include reviewing mission statements, governance structure, college programs, facilities, and staff. Discussion focused on theories and stages of organizational development, the management information system, and program review. Also considered were strategic options and tactical alternatives, and integration (e.g., vertical and horizontal coordination). Rating scales to assess/audit the external/internal environment are included, along with matrices for the criteria of centrality, quality, and market viability. (SW)

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Report of

The 10th Annual Management Institute

for College and University Executives

on the topic

"Strategic Planning and Management"

July 21-26, 1985

arranged by

Richard C. Ireland, President

Marketing Services Group

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The Snowmass Institute

The Snowmass Institute for Advanced Management Studies was founded in the summer of 1975 to offer week-long programs in management and marketing for college and university personnel. The goal of the Institute is to uniquely combine professional development activities and relaxation in one package. Sessions are scheduled in the morning and early evening, leaving the afternoon and late evening open so participants can take full advantage of the tremendous entertainment and recreation opportunities in the Snowmass/Aspen mountain resort area.

Over the years several different programs have been conducted by persons with national reputations in the field. Basic and advanced marketing programs ran for several years. During the fall of 1980, Drs. Robert G. Cope and Warren H. Groff were asked to develop a conceptual framework for a workshop on the topic "Strategic Planning and Management." That workshop began with an overview and introduction to the topic followed by a discussion of models for strategic planning and management drawn from the literature and personal experience in public and private two-year, four-year, and university contexts. The next two days were spent in discussing techniques for assessing an institution's external environment. The third day was spent in discussing techniques for auditing an institution's internal environment. The fourth day dealt with integration including linking budgeting to planning. On the fifth day, several institutional representatives from various types of contexts presented their plans and the workshop leaders offered some final comments. This workshop format was followed in 1981, 1982, 1983, and 1984.

During the last two years, numerous participants in the workshop requested an advanced workshop on strategic planning and management. Topics suggested for inclusion were numerous. The topics included (1) refinements in assessing the external environment, (2) elaboration in auditing the internal environment, (3) use of outcomes assessment information in strategic planning, (4) linking accreditation and strategic planning, (5) consortia and partnerships, (6) the involvement of alumni in strategic planning, (7) strategic planning and grantsmanship/resource development, (8) creating visions of the future, and many more. During the workshop in 1984 and throughout the fall of that year, the two workshop leaders developed the conceptual frameworks and specific topics for a "basic institute" and an "advanced institute." (See FIGURE 1) These two institutes were run July 21-26, 1985. This is a brief report of the two institutes.

The Program

Overview of Basic and Advanced Workshops

The Snowmass Institutes on "Strategic Planning and Management" are for college personnel who want to develop a strategic approach to planning and managing their department, division, college/school, institution or system. The basic institute is designed for persons who are aware of the concept, are in the early stages of becoming familiar with this management approach and may be in the early stages of implementing the process. The advanced institute is for persons who have experience with this management approach and seek to enrich that understanding through discussions about advanced concepts.

One way to approach the distinction between basic and advanced institutes is to examine the components of strategic planning and management. Strategic planning and management is a process that includes (1) assessing an institution's external environment to determine opportunities and threats, (2) auditing an institution's internal environment to determine strengths and weaknesses, (3) using these two sets of information to develop visions and alternative scenarios, and (4) making deliberate choices about strategic options and tactical alternatives as a prelude to managing the plan. The procedure for doing all this is usually detailed in a "plan to plan" statement. If a person can check "yes" to three or more of the following questions, the advanced institute is appropriate. If not, the person would be well advised to register for the basic institute.

		Yes	No
1.	Does your unit (department, division, college, institution, or system) have a plan to plan?	___	___
2.	Does your unit assess its external environment to rank order of opportunities and threats?	___	___
3.	Does your unit audit its internal environment to rank order strengths and weaknesses?	___	___
4.	Does your unit develop visions and alternative scenarios?	___	___
5.	Does your unit make deliberate choices about strategic options and tactical alternatives as a prelude to managing and evaluating?	___	___

Participants

Participants were asked to complete a characteristics sheet and indicate what they hoped to accomplish by the end of the workshop. Characteristics of the participants are displayed in FIGURE 2.

Models of Strategic Planning

Numerous models of strategic planning were presented. These models included examples from the Council of Independent Colleges (formerly the Council for the Advancement of Small Colleges), the Academy for Educational Development, the American Association of State Colleges and Universities, and numerous two-year colleges. These models all suggest an assessment of an organization's external environment to determine opportunities and threats and an audit of an organization's internal environment to determine strengths and weaknesses.

External Environment

The external environment includes demographic characteristics, social indicators, economic trends, political change, technological advances, changes in the workplace, special focus areas such as information technologies, value shifts and numerous other variables. The literature indicates at least four techniques for assessing the external environment: (1) needs assessment, (2) market analysis, (3) environmental scanning, and (4) trend analysis.

Participants were given a great deal of information about the above-mentioned variables in their institution's external environment. This was followed by a discussion about the techniques for assessing the external environment. Participants then listed opportunities and threats in their external environment. They were then grouped by institutional type to discuss opportunities and threats and ultimately label them as primarily demographic, social, economic, political, or technological.

Participants were then asked to specify the extent to which their institution assesses the above-mentioned variables and to audit the use of technique such as (1) needs assessment, (2) market analysis, (3) environmental scanning and (4) trend analysis. See FIGURES 3 and 4. This exercise served as a transition from assessing the external environment to auditing the internal environment.

Internal Environment

The internal environment consists of institutional culture, how the institution functions, its strategy, and dimensions of efficiency and effectiveness. An audit of the internal environment would include a review of the mission statement, goals and objectives, governance structure, certificate and degree programs, learning and learning resources, faculty and teaching, finances and facilities, organization and administration, and planning and outcomes. Discussion focused on (1) theories of organizational development, (2) stages of organizational development, (3) sophistication of the management information system, and (4) program review.

Program review can be accomplished through an intensive examination of three aggregate criteria: (1) centrality, (2) quality, and (3) market viability. Centrality simply means the proximity of the program to the central purpose of the institution. Quality is a function of (1) faculty, (2) students, (3) library holdings, (4) equipment, (5) facilities, (6) finances, (7) support services, and (8) other program characteristics. Market viability is a function of competition, image, and a variety of external factors.

Participants were led through a process of program review using the three aggregate criteria of centrality, quality, and market viability. Use FIGURES 5 and 6. Participants took a set number of programs, say 30, and divided that number by 9, the number of cells in the 3 x 3 matrix in FIGURE 5. That would mean that 6 cells would contain 3 programs and 3 cells would contain 4 programs. Participants were then asked to array the program in the cells in FIGURE 5 based on centrality and quality. The next step was then to relate the centrality/quality ratings to market viability, insights drawn primarily from the assessment of the external environment. Programs in the high quality/high centrality cell (1) of the Q/C Matrix were distributed in cells 1, 4, and 7 in the Q/C - Market Viability Matrix. For example, assume a participant placed 3 programs in cell number 1 of the Q/C Matrix; the participant would then place 1 program in cell 1, 1 program in cell 4, and 1 program in cell 7 in the Q/C - Market Viability Matrix. Programs in the medium quality/medium centrality cells (2, 4, and 5) of the Q/C - MV matrix were distributed in cells 2, 5, and 8 of the QC-MV Matrix. Programs in the low quality/low centrality cells (3, 6, 7, 8, and 9) of the Q/C Matrix were distributed in cells 3, 6, and 9 of the Q/C - MV Matrix. An alternative method for program review is to label the second matrix (1) comparative advantage and (2) demand and follow much the same procedure. The use of such techniques for program review yield insights into decisions administrators can use to maintain, reduce, or invest more resources. See FIGURES 7 and 8.

Participants then listed strengths and weaknesses of their institutions and began to rank order them. Participants then discussed their lists of strengths and weaknesses in small groups of persons from similar types of institutions.

Strategic Options and Tactical Alternatives

The purpose for assessing the external environment is to identify, hopefully rank order, opportunities and threats. The purpose for auditing the internal environment is to analyze strengths and weaknesses. The intent is to maximize strengths, minimize weaknesses, take advantage of opportunities, and reduce or eliminate threats. Information obtained from assessing the external environment and auditing the internal environment should yield insights about strategic options and tactical alternatives.

Strategic options include (1) directing resources toward higher quality, (2) directing resources toward public service, (3) directing resources toward new student clientele, (4) directing resources toward research, and (5) retrenchment and/or reduction in scale.

Tactical alternatives for the strategic option of higher quality include (1) diagnostic services including career life planning and basic skills testing, (2) content either in a "stand-alone" format or an integrated format, (3) delivery systems including technology to reach "distant learners," (4) evaluation methodology including competency-based formats, and (5) outcomes and follow-up studies.

As a way of emphasizing diversity and individualization, participants were provided the opportunity to complete a learning styles inventory by Kolb, Rubin, and McIntyre[1] and a hemisphericity instrument by Torrance, Reynolds, Riegel and Ball.[2] The learning styles inventory provides scores for four preferences labeled (1) concrete experience, (2) reflective observation, (3) abstract conceptualization, and (4) active experimentation. The

hemisphericity instrument yields a score for the right hemisphere preference, the left hemisphere preference, and the integrated preference. Raw scores for 17 persons in the basic workshop are displayed in FIGURE 9. FIGURE 10 is a display of high, low and mean scores on the learning styles inventory.

Tactical alternatives for the strategic option of public service include (1) small business development, (2) economic development, (3) technology transfer, (4) building better boards, (5) issues clarification, (6) strategic planning for community agencies, (7) community goal setting projects, and (8) community leadership development projects.

Tactical alternatives for the strategic option of new student clientele include (1) programs to upgrade skills of market segments of the current workforce, (2) dislocated workers who must be retrained, (3) migrants and immigrants, (4) international students either on campus or in developing nations, (6) single parents, and numerous other market segments.

FIGURE 11 is a model of strategic planning and management.

Integration

Another important segment of the basic and advanced workshops dealt with integration. Integration deals with linking certificate and degree programs such as data processing, electronic engineering and mechanical engineering in an effort to move toward an understanding of Computer Integrated Manufacturing Systems. Integration includes horizontal coordination of organizational functions such as academic affairs, student services, administration and development. Integration includes vertical articulation between department,

division, college or school, university, and/or system levels. Integration includes linking planning to management and evaluation through a budgeting and resource allocation process.

Special Topics

The basic and advanced workshops highlighted selected topics such as (1) use of outcomes assessment information in strategic planning, (2) linking accreditation and strategic planning, (3) strategic planning and grantsmanship/resource development, and (4) creating visions of the future. The National Center for Higher Education Management Systems generated a conceptual framework for outcomes in the 1970s after thoroughly reviewing more than 80 studies on the topic; this conceptual framework along with research on outcomes by the National Center for Research in Vocational Education provided the basis for the discussion on outcomes.[3]

Regional accrediting associations have encouraged institutions to make extensive use of planning processes and documents in seeking reaffirmation of accreditation. Revisions in criteria and standards were discussed along with how several institutions were able to obtain reaffirmation of accreditation primarily through a comprehensive planning process.

Grantsmanship and resource development are becoming increasingly more important as costs increase and the local and state economic sources shift. Strategic planning yields long-term images and visions that institutional personnel can convert to multi-year operational plans that can be used in grantsmanship or the development of "case statements" for private and public resource development activities.

"Visions of the future" was another special topic. What will education and training be like in the Year 2020? Why 2020? First, if someone says you have 2020 vision, it is psychologically and physiologically gratifying. It means you have clear definition and sharp focus. There are, however, other reasons for considering 2020. In some areas and states debt service retirement extends for 35 years. Building being constructed now will encumber us to 2020. More important, however, persons who are going through undergraduate programs of preparation or in the early stages of development could still be teaching in 2020. The way we program them now is likely to be the way they carry out their role over the next 35 years.

Conclusion

The Snowmass Institutes on "Strategic Planning and Management" have been a reflection of the evolution of the technology to manage institutions of postsecondary education. In 1981, participants asked basic questions such as "What is strategic planning?" and "How do I do strategic planning?" Today, many institutions are engaged in some form of planning. We are, however, still in the early stages of the evolution and adoption of the management technology known as strategic planning and management. To reach full maturity, we must elevate that management technology from a concentration of counting quantifiable external and internal variables to creating preferred futures with an expanded roster of participants through new alliances and partnerships.

FOOTNOTES

[1] David A. Kolb, Irwin M. Rubin, and James M. McIntyre, Organization Psychology, an Experiental Approach (Englewood Cliff, N.J.: Prentice-Hall, Inc., 1971).

[2] E. Paul Torrance, Cecil R. Reynolds, Theodore Riegel, and Orlow Ball, "Your Style of Learning and Thinking," The Gifted Child Quarterly, (Winter 1977) Vol. XXI, No. 4.

[3] Oscar T. Lenning, Yong S. Lee, Sidney S. Micek, and Allen L. Service, A Structure for the Outcomes of Postsecondary Education (Boulder, CO: National Center for Higher Education Management Systems, 1977).

Carolyn M. Taylor, Robert L. Davey, and Kathleen A. Bolland, Vocational Education Outcomes: Annotated Bibliography of Related Literature (Columbus, OH: The National Center for Research in Vocational Education, 1979).

FIGURE 1

	BASIC INSTITUTE	ADVANCED INSTITUTE
MONDAY	Introductions and Characteristics of Participants Overview of The Strategic Concept — Cope and Groff	
	Models and Resources The Future - Conceptual Frameworks The External Environment — Groff	Stakeholder Multiple Strategic Options and Tactical Alternatives — Cope
	Subgroups Discussion, Opportunities and Threats — Cope	Visions of the Future - 2020 — Groff
TUESDAY	The External Environment — Groff	Internal Audit Organizational Functioning Program Review — Cope
	Subgroups Rank Order Opportunities and Threats Individuals Rank Order Opportunities and Threats — Groff	Retrenchment Reduction In Scale — Cope
	Audit Institution's Ability to Assess Program Review Learning Styles & Hemisphericity — Groff	Reduction In Force — Cope
WEDNESDAY	Internal Audit — Cope	The External Environment Consortia, Linkages and Partnerships — Groff
	Program Review — Cope	Strategic Options and Tactical Alternatives Grantsmanship-Resource Dev. — Groff
	Subgroups Strengths and Weaknesses — Cope	Strategic Planning for Econ. Dev. International Trade Community Development — Groff
THURSDAY	Strategic Options and Tactical Alter. Higher Quality New Student Clientele — Groff	Stakeholders Refined Values Power — Cope
	Public Service/Research Retrenchment Rank Order of Strategic Options — Groff	Advanced Strategic Concepts — Cope
	Integration-Link Budgeting and Planning Accreditation Involving Alumni in Strategic Planning Outcomes: Output and Impact — Groff	Advanced Strategic Concepts — Cope
FRIDAY	Visions of the Future - 2020 The Education Reform Movement — Groff	Participant Reports — Cope
	Wrap-up and Graduation — Groff	Wrap-up and Graduation — Cope

FIGURE 2

CHARACTERISTICS OF PARTICIPANTS

TRACK I	TRACK II	
		GOVERNANCE
8	4	State-wide system, 1 board
3	4	Single institution, own board
3	4	Multi-campus institution, own board
4	11	Private, own board
0	2	Other
		LOCATION
4	6	Rural
7	10	Suburban
5	8	Urban
1	1	All three
		ECONOMIC ENVIRONMENT
2	3	Depressed
8	8	Steady State
5	12	Expanding
		STAGE OF INSTITUTIONAL DEVELOPMENT
0	2	0 - 9 years old
3	2	10 - 19 years old
4	6	20 - 29 years old
3	1	30 - 39 years old
1	2	40 - 49 years old
5	11	50 + years old
		FUTURE ENROLLMENT DIRECTION
1	2	Expansion, 10% or more enrollment increase expected
6	7	Expansion, 5-10% enrollment increase expected
7	9	Steady State
2	6	Reduced Scale, 5-10% enrollment decrease expected
1		Reduced Scale, 10% or more enrollment decrease expected
		CURRENT FTE
1	2	Less than 1,000 FTE
13	12	1,000 to 4,999 FTE
1	4	5,000 to 9,999 FTE
1	4	10,000 to 19,000 FTE
0	0	20,000 to 29,000 FTE
0	1	30,000 or more
		INSTITUTIONAL CONTEXT
10	17	Collegial, broad-based, participatory mode of collaborative planning
5	3	Hierarchial, top down, mode of planning
1	2	Organized collective bargaining

FIGURE 3

THE EXTENT TO WHICH INSTITUTIONS ASSESS THEIR EXTERNAL ENVIRONMENT

	5	4	3	2	1	0
A. DEMOGRAPHIC CHARACTERISTICS		7	4	4	1	
B. SOCIAL INDICATORS			2	9	5	
C. ECONOMIC TRENDS		3	7	6		
D. POLITICAL CHANGE	1	1	4	5	2	2
E. TECHNOLOGICAL ADVANCES		3	6	5	2	
F. CHANGES IN THE WORKPLACE		2	6	6	2	
G. INFORMATION TECHNOLOGIES		3	5	6	2	
H. VALUE SHIFTS			1	9	3	3

Key: 5 Outstanding
4 Good
3 Satisfactory
2 Doubtful
1 Unsatisfactory
0 Non-existent

FIGURE 4

EVALUATION FORMAT TO AUDIT USE OF
TECHNIQUES TO ASSESS THE EXTERNAL ENVIRONMENT

	5	4	3	2	1	0
I. Planning, Research, and Evaluation						
1. External Environment	2	2	1	3	1	2
a. Needs Assessment						
Unfamiliar with the literature	0					
Familiarization with the literature	0					
Participated in a needs assessment	1					
Critically analyzed several needs assessment instruments or studies	1					
Conducted a needs assessment	2					
Conducted several needs assessments	2					
Critically evaluated data from a needs assessment	3					
Critically evaluated data from several needs assessment	3					
Fed needs assessment data back into planning process	4					
Fed data back into planning process, implemented change program, and evaluated results	5					

	5	4	3	2	1	0
b. Market Analysis	_	1	2	7	_	1
Unfamiliar with the literature	0					
Familiarization with literature/terms	0					
Clearly defined philosophy-elitist, hard sell, satisfaction of needs	1					
Recognition of components-research, strategy, communication	1					
Data base of demographics for traditional students	2					
Data base of demographics for non-traditional students	2					
Market segmentation data base	3					
Clearly developed strategies for market segments	3					
Communications mechanisms in relation to strategies	4					
Evaluation of research, strategy, and communications	4					
College marketing plan based on components	5					

KEY:
5 Outstanding, far exceeds reasonable expectations
4 Good, generally exceeds reasonable expectations
3 Satisfactory
2 Doubtful, generally falls short of reasonable expectations
1 Unsatisfactory, totally inadequate
0 Non-Existent

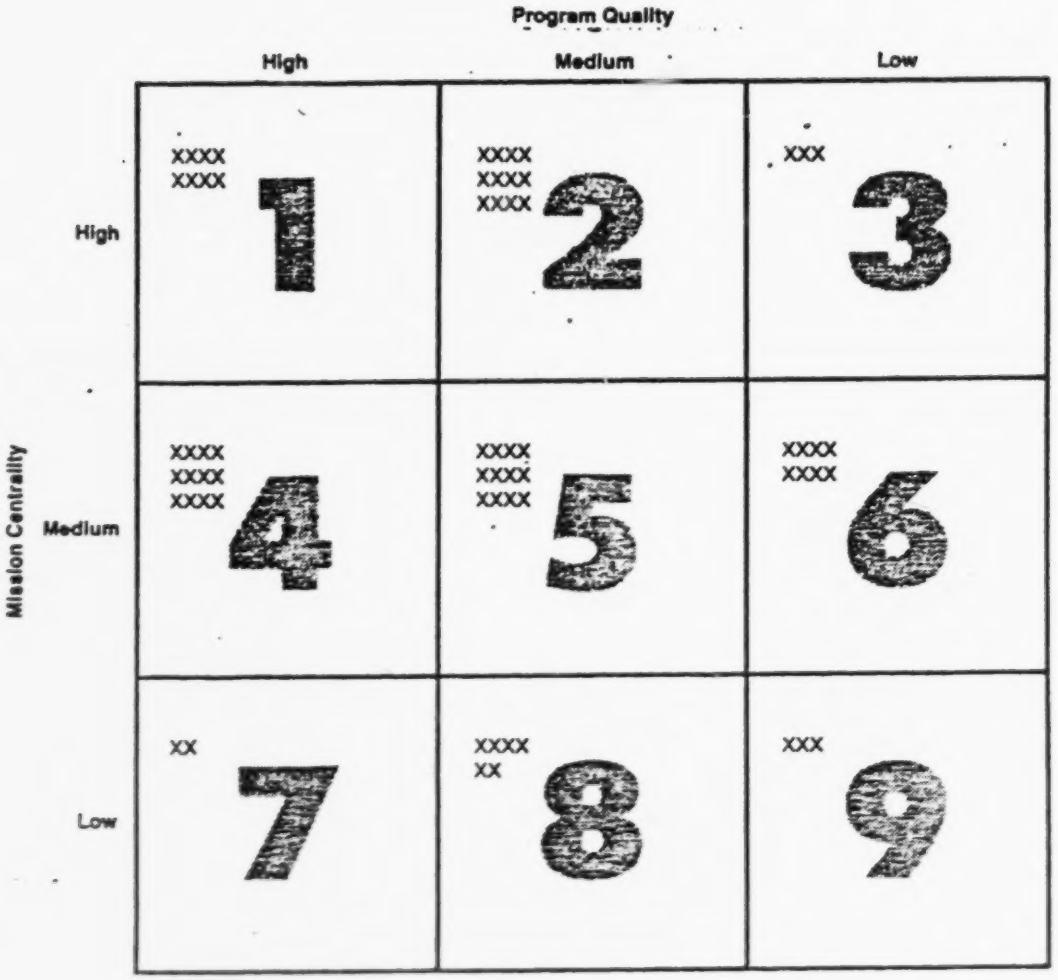
		5	4	3	2	1	0
c.	Environmental Scanning	_	1	1	4	3	2
	Unfamiliar with the concept	0					
	Familiar with the concept but don't pay attention to changes in the environment	1					
	Don't have a trend analysis capability to which environmental scanning can link	1					
	Occasionally look at gaps in trend analysis data and conduct an environmental scan	2					
	Regularly examine external MIS to identify areas for environmental scanning	2					
	Regularly collect environment scan data	3					
	Regularly collect and analyze data	3					
	Data are interpreted into assumptions	4					
	Data are fed into trend analysis and other functions of the college	5					

		5	4	3	2	1	0
d.	Trend Analysis	_	1	3	1	5	1
	Unfamiliar with the concept	0					
	Familiar with concept but don't pay attention to trends	0					
	Look at trends if they cross my desk	1					
	Actively pursue data about demographic, social, political, and economic trends	1					
	Have developed a structure for analysis of such trends in selected functions of the college	2					
	Use selected trend analysis data to make assumptions and in planning	3					
	Some data are interpreted into assumptions before goals and objectives are specified ...	4					
	College has a structure to collect and analyze trend analysis data used to specify assumptions before setting goals and objectives for all functions of the college	5					

KEY:
5 Outstanding, far exceeds reasonable expectations
4 Good, generally exceeds reasonable expectations
3 Satisfactory
2 Doubtful, generally falls short of reasonable expectations
1 Unsatisfactory, totally inadequate
0 Non-Existent

FIGURE 5

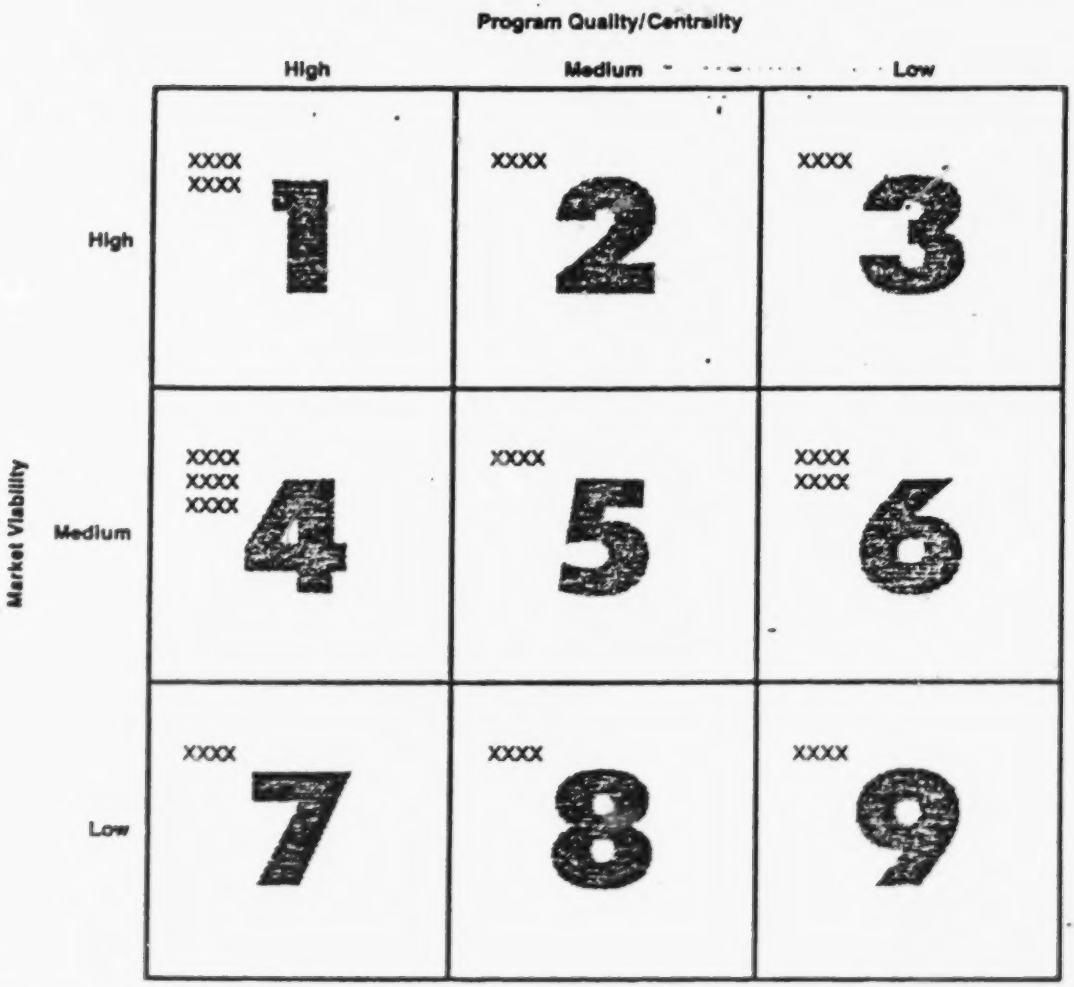
QUALITY/CENTRALITY MATRIX



A Marketing Approach to Program Development (Washington, D.C.: Council for the Advancement of Small Colleges, 1978).

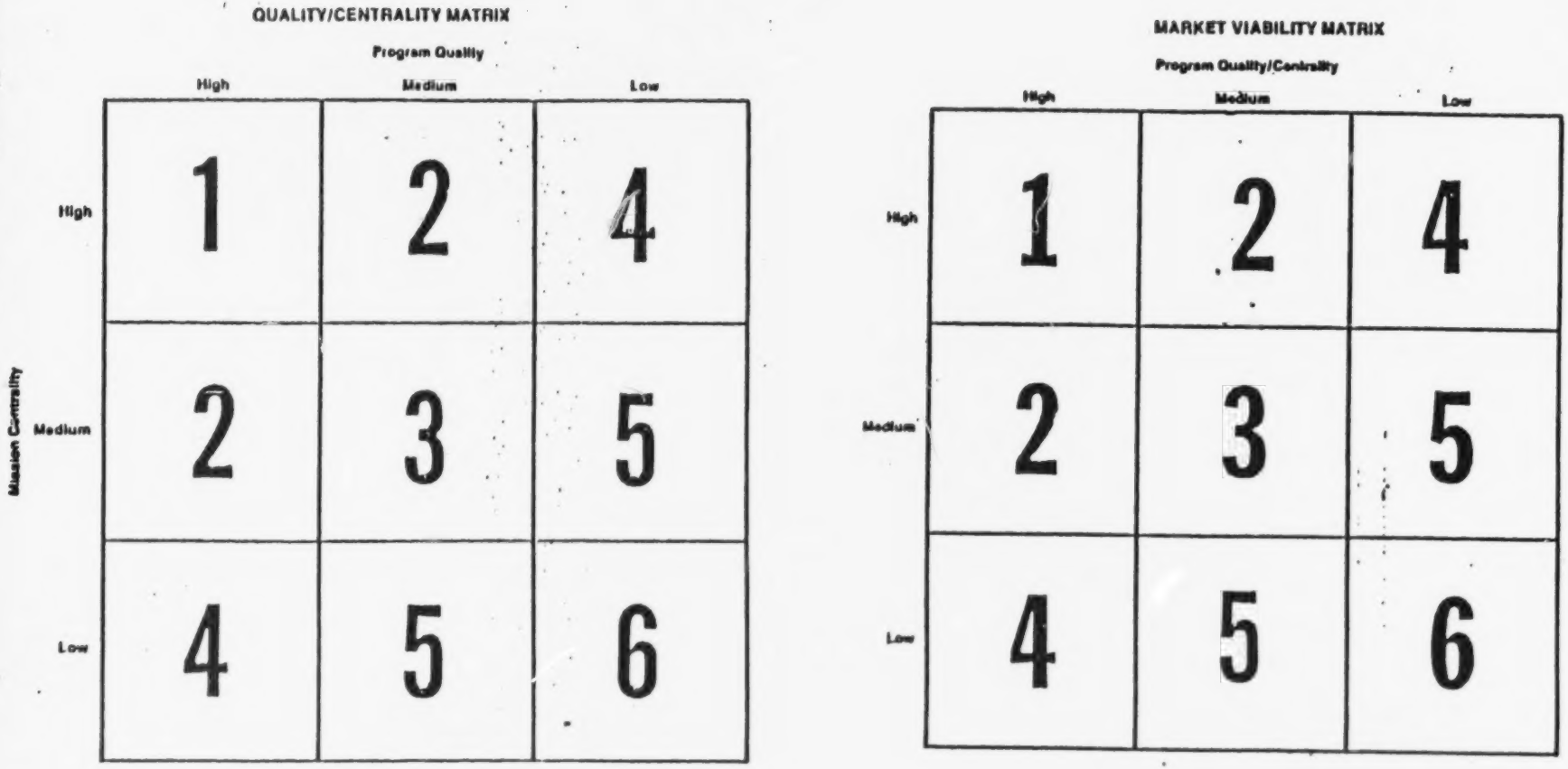
FIGURE 6

Q/C-MARKET VIABILITY MATRIX



A Marketing Approach to Program Development (Washington, D.C.: Council for the Advancement of Small Colleges, 1978).

FIGURE 7



SOURCE: Robert G. Cope, "Ideas on How Strategic Planning Differs From Long-Range Planning and How to Review Programs," November 1982, pp. 15 and 18.

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FIGURE 8

A DECISION TABLE FOR PROGRAM REVIEWING

Program Examples	Institutional View			Strategic View		
	If Quality	If Centrality	Decision on Continuation	If Comparative Advantage	If Demand	Decision on Budget
A	High	High	Yes	High	High	Invest More
B	High	High	Yes	High	Moderate	Maintain
C	High	High	Yes	High	Low	Maintain
D	High	High	Yes	Medium	High	Invest More
E	High	High	Yes	Low	High	Maintain
F	High	High	Yes	Low	Moderate	Maintain
G	High	High	Yes	Low	Low	Reduce
H	Low	High	Yes	Low	Low	Invest to Improve
I	High	Low	Reorganize	Medium	High	Maintain
⋮	⋮	⋮	⋮	⋮	⋮	⋮
X	Moderate	Moderate	Discontinue regardless of comparative advantage or demand			
Z	Low	Low	Discontinue regardless of comparative advantage or demand			

SOURCE: Robert G. Cope, "Ideas on How Strategic Planning Differs From Long-Range Planning and How to Review Programs," November 1982, p. 12.

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FIGURE 9

LEARNING STYLES AND HEMISPHERICITY SCORES

Participant	CE	RO	AC	AE	R	L	I
1	20	15	14	14	15	14	11
2	11	15	17	16	15	14	11
3	11	11	20	19	7	11	22
4	19	18	9	18	11	8	21
5	20	11	11	18	14	9	17
6	12	12	22	18	7	3	30
7	17	6	19	16	6	4	30
8	15	11	21	19	8	13	19
9	13	16	20	16	7	17	16
10	10	17	22	9	9	15	16
11	17	16	18	13	3	16	21
12	12	9	18	21	6	3	31
13	16	14	21	15	6	5	29
14	15	11	19	17	14	8	18
15	11	10	22	19	8	20	12
16	17	15	14	16	20	9	11
17	12	11	15	20	9	7	24
H	20	18	22	21	20	20	30
L	11	6	9	9	3	3	11
M	14.5	12.8	17.8	16.7	9.7	9.7	20.7

KEY:
CE - Concrete Experience
RO - Reflective Observation
AC - Abstract Conceptualization
AE - Active Experimentation
R - Right Hemisphere
L - Left Hemisphere
I - Integrated

FIGURE 10

LEARNING STYLE PROFILE

Norms for the Learning Style Inventory

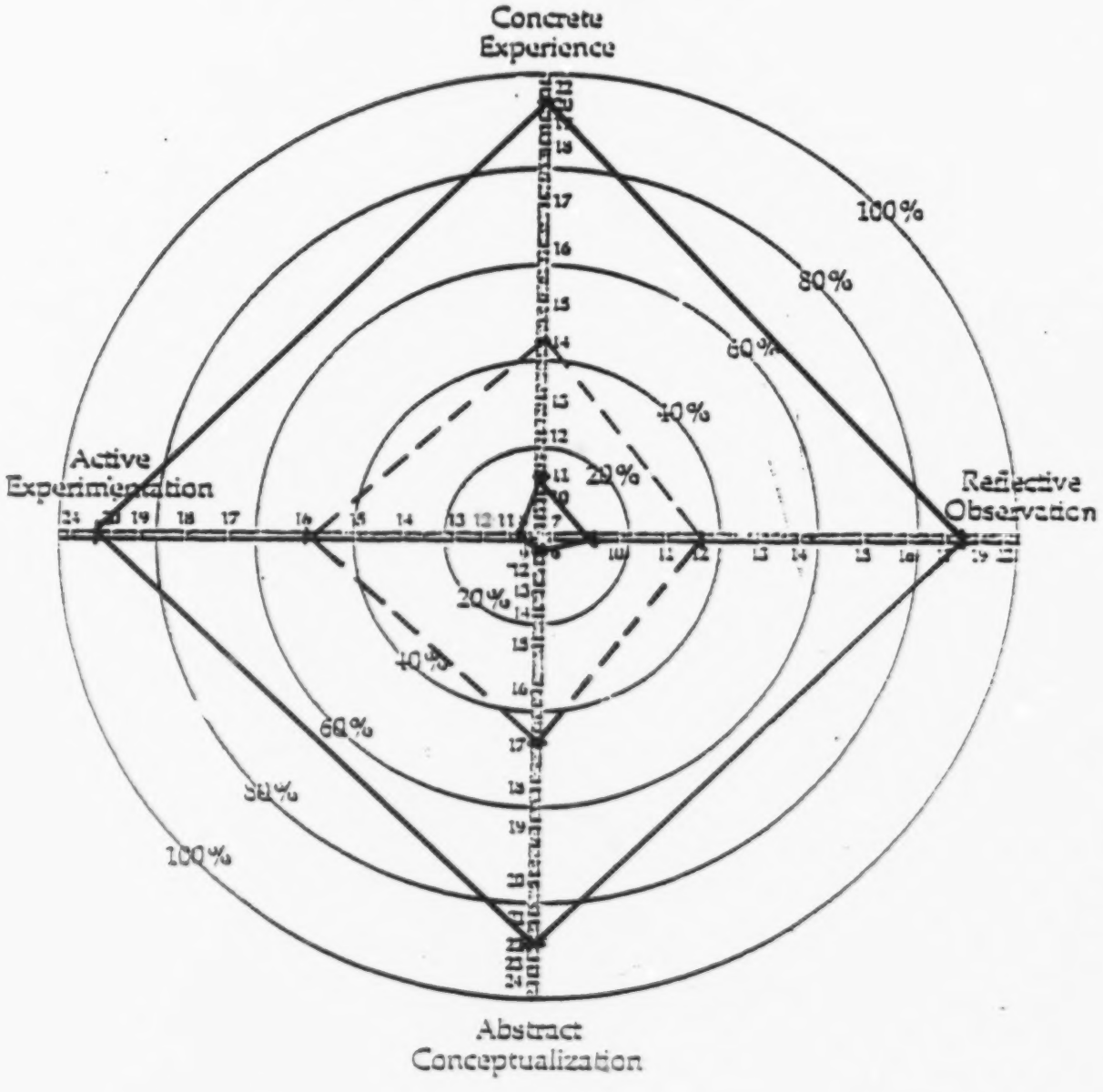

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FIGURE 11

STRATEGIC PLANNING AND MANAGEMENT

ASSESS & AUDIT

External Assessment

- Demographic Trends
- Social Indicators
- Economic Trends
- Political Change
- Technological Advances
- Changes In The Workplace
- Information Technologies
- Value Shifts

Images
Visions
Scenarios

- Mission, Goals & Objectives
- Governance Structure
- Programs: Academic & Occupational
- Students and Student Services
- Learning and Learning Resources
- Faculty and Teaching
- Finances and Facilities
- Organization and Administration
- Planning and Outcomes

Internal Audit

STRATIGIC OPTIONS & TACTICAL ALTERNATIVES

A. Higher Quality
   1. Diagnostic Services
   2. Content
   3. Delivery System
   4. Evaluation Methodology
   5. Outcomes & Follow-Up

B. Public Service
   1. Small Business Development
   2. Economic Development
   3. Technology Transfer
   4. Building Better Boards
   5. Issues Clarification
   6. Strategic Planning
   7. Goal Setting Projects
   8. Community Leadership Development

C. New Student Clientele

D. Research

E. Retrenchment/Reduction In Scale

STRAGEGY & MANAGEMENT